



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

Required Report - public distribution

Date: 2/15/2000

GAIN Report #NL0008

## **The Netherlands**

### **Grain and Feed**

### **Grain & Feed Annual Report**

## **2000**

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#### **Report Highlights:**

**Compound feed production increased by 1 percent, mostly due to delays in restructuring the hog sector. Dutch government wants to ban the use of all animal products in animal feed by July 1, 2000.**

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Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

The Hague [NL1], NL

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## **Executive Summary**

According to official estimates, Dutch grain production was similar to 1998; about 1,4 million metric tons were harvested. Wheat and barley yields increased by an average of 12 percent, mainly due to favorable weather conditions. The total production of winter wheat fell by 40 percent due to excessive rainfall while the production of summer wheat quadrupled in 1999. Barley production increased sharply by about 70 percent due to increased acreage seeded to barley, favorable weather conditions and high yields per hectare.

Preliminary 1999 data indicate that total compound feed production increased slightly by 1 percent, as compared to 1998. This was mainly because of delays in restructuring the hog sector. Demand remained therefore fairly comparable as in previous years. Nevertheless, the feed industry still anticipates that the hog sector will be reduced by about 20 percent and that this will also negatively impact pig feed production (and consumption).

In 1999, the Dutch government called for tougher legislation with regard to feed ingredients. The EU Commission stated that the rules and regulation for animal feed will have to be changed and called upon the member states to implement stricter legislation. This is mainly a reaction to the dioxin contamination of feed in Belgium. As a result of the dioxin crisis, other food scares, consumer concerns and so on, the Dutch government wants to ban the use of all animal products in animal feeds by July 1, 2001.

There is no commercial rice production in the Netherlands but the Netherlands is an important importer and miller of brown rice. The United States is the major supplier to the Dutch market with exports valued at approximately \$36 million. Total Dutch rice imports fell by about 15 percent in 1998 due to high stocks and falling exports. Imports from Thailand and India increased by about 30 and 23 percent respectively. Consumption was stable at about 60 thousand metric tons.

## Grain

### Production

Dutch grain production reached similar production levels as in 1998. Yields of wheat and barley increased by an average of 12 percent, mainly due to favorable weather conditions. The total production of winter wheat fell by 40 percent to 567,000 metric tons because a smaller area was seeded to winter wheat due to adverse weather conditions. This led to a shift in planting and production of summer wheat quadrupled in 1999. Also barley production increased sharply by about 70 percent due to increased acreage seeding to barley, favorable weather conditions and high yields per hectare.

**Table 1: Grain Production in the Netherlands**  
(1000 Mt)

	1997	1998*	1999
Wheat	1,063	1,072	890
Barley	268	214	365
Corn	104	98	130
Others	55	59	39
Total	1,490	1,443	1,424

\* Official estimate

Source: Stigevo

Dutch wheat milling decreased by 7 percent in marketing year 1998/99, due primarily to decreased export sales of flour. Dutch flour production is expected to reach similar levels, or decrease slightly, in marketing year 1999/2000 as export forecasts are not very favorable. The use of Dutch wheat for milling continues to decline and flour is mainly imported from other EU countries, including the United Kingdom.

### Trade

Dutch traders believe world prices for grains will be low for the next decade or so. Although prices for wheat remained very low, production has not yet been affected. Export prices for wheat remained at about \$ 100 per metric ton. Dutch flour exports decreased by about 20 percent from 600,000 metric tons to 460,000 metric tons. At the beginning of 2000, Dutch grain traders were positive about the developments on the grain market. Although exports are low, the local demand, especially for feed wheat, is relatively high. Therefore, prices are also higher than in 1999. For 2000 it is anticipated that prices will be higher due to lower production in the EU.

## Compound Feed

### Production

**Table 2: Compound Feed Production in the Netherlands**  
(Calendar Year/1,000 tons)

	1997	1998	1999*	2000*	2002*
Cattle Feed	3,654	3,598	3,570	3,700	2,900
Pig Feed	7,052	6,950	6,985	5,800	5,700
Poultry Feed	3,740	3,727	3,840	3,700	4,100
Others	795	767	780	800	750
Total	15,241	15,042	15,175	14,000	13,450

\* Estimate

Source: Stigevo

Preliminary 1999 data indicate that total compound feed production increased slightly by 1 percent in 1999, as compared to 1998. This was mainly due to the delays in restructuring the hog sector. Demand remained fairly comparable to previous years. Nevertheless, the feed industry still anticipates that the hog sector will be reduced by about 20 percent over the next three years and that pig feed production and consumption will also decrease.

Feed production for the poultry sector increased between 1 and 2 percent in 1999 in response to a continued increase in the number of chickens from 99 million in 1998 to 100 million in 1999. Although increased demand from the poultry sector partly compensated for the decline in demand from the hog sector, total Dutch feed production is expected to end the century more than one million tons below the 1990 output level. Dutch traders forecast that the total Dutch feed production will decline over the next three years after decades of expansion.

### Consumption: Feed Use

The Dutch compound feed industry has traditionally used a significant percentage of imported non-grain feed ingredients in their feed rations such as tapioca, soybean meal and corn gluten feed. This ingredient usage pattern is partly explained by the proximity of the port of Rotterdam to the Dutch compound feed factories which makes the duty-free import and domestic usage of non-grain feed ingredients relatively attractive vis-a-vis imports of grain from France or other EU origins. U.S. exports of soy hulls to the Netherlands fell from 500,000 metric tons to 475,000 metric tons in marketing year 1998/1999. Traders forecast that in 2000, U.S. exports to the Netherlands of citrus pulp pellets will increase from about 600,000 metric tons to 650,000 metric tons due to lower imports from Brasil.

The grain share in animal feed is expected to increase gradually through 2001 due to a variety of reasons including the expected increase in the use of on-farm mixed feed (at the expense of compound feed). Historically low grain prices should also stimulate grain use. Lower prices brought about by CAP reform will also favor the use of EU grain in feed rations. However, grains are not expected to account for more than 20 percent of the overall compound feed formula.

**Table 3: Feed Grain Usage in the Netherlands**  
(Marketing Year/1,000 MT)

	94/95	95/96	96/97	97/98*	98/99*
Wheat	1,022	1,509	1,530	1,355	1,400
Barley	696	990	902	248	350
Corn	811	767	659	1203	1125
Others	83	418	258	282	275
Total	2,612	3,684	3,349	3,088	3,150

\* revised

Source: Stigevo

### Trade

Dutch compound feed exports total about one million tons, of which 80 percent is exported to other EU countries (Germany, Belgium, UK). As the consumption of animal feed is expected to continue to decline in the Netherlands, exports will become more important. According to the Dutch Compound Feed Producers Association, the main obstacle to expanding exports is high transport costs.

### Policy

The Dutch government called for tougher legislation with regard to feed ingredients. Also the EU Commission stated that the rules and regulation for animal feed will have to be changed and called upon the member states to implement stricter legislation. This is mainly due to the dioxin contamination of feed in Belgium. This feed crisis has had an enormous effect on the Belgian livestock sector, feed industry and general economy. For example, in the first month after the discovery of dioxin contamination (June), exports from the Belgian agricultural and food sectors were down by 24 percent, as compared to the previous year. As a result of the dioxin crisis, other food scares and consumer concerns. The Dutch government wants to ban the use of all animal products in animal feeds by July 1, 2001.

Total Dutch compound feed production is expected to fall significantly, with estimates ranging from 10 to 25 percent, through 2005. The expected decline is attributable to:

- 1 the Dutch Government policy to reduce pig numbers
- 2 strict manure and environmental regulations that will restrict growth in the livestock sector
- 3 the Government's decision to restrict growth in the poultry sector (which means that the number of layers, broilers and turkeys in the Netherlands will not be allowed to increase beyond the current level of 100 million. A new law is expected to be passed in the near future which will specify the exact number of chickens/turkeys a farmer can keep.)
- 4 animal welfare concerns which could lower production and increase costs (more space for chickens, free range pigs etc.)
- 5 the reduction in cattle feed production due to improving productivity of milk production and declining beef consumption. Growth is expected in the use of both on-farm mixed feed and industrial by-products- at the expense of compound feed.

According to the Dutch Product Board for Grain and Feed, the Netherlands is the top market for U.S. corn gluten feed (CGF), which is mainly used as animal feed. U.S. CGF exports to the Netherlands are approximately \$400 million annually. However, to the extent that CGF is increasingly derived from genetically modified corn varieties, U.S. exports to the Dutch market could be threatened. There is still a lack of concise EU regulations on the use of GMO varieties. The Dutch Government decided to have corn varieties tested in the Netherlands by the Dutch Institute for Quality Control (Rikilt). On the basis of the analysis made in the Netherlands, the Dutch Government authorized the use of corn gluten feed for the animal feed industry. The Dutch Government generally complies with the EU regulations. For the 1999/2000 marketing year the CGF issue will likely return on the agenda unless the EU takes appropriate steps to regulate CGF trade. The Dutch will have the varieties tested by Rikilt if EU alternatives are not forthcoming. Nevertheless, the Dutch industry wants a better control and monitoring system in the U.S. to avoid problems that could re-emerge by the end of 2000.

**P.D. & Trade Matrices**

PSD Table						
Country	Netherlands					
Commodity	Wheat				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Harvested	137	137	100	102	0	125
Beginning Stocks	200	100	200	103	200	100
Production	1,072	1,100	810	851	0	1,000
TOTAL Mkt. Yr. Imports	3,000	3,400	3,200	3,022	0	3,100
Jul-Jun Imports	3,000	2,700	3,200	3,022	0	3,100
Jul-Jun Import U.S.	6	11	0	10	0	11
TOTAL SUPPLY	4,272	4,600	4,210	3,976	200	4,200
TOTAL Mkt. Yr. Exports	600	1,017	600	800	0	780
Jul-Jun Exports	600	310	600	225	0	225
Feed Dom. Consumption	1,700	1,355	1,700	1,400	0	1,600
TOTAL Dom. Consumption	3,472	3,480	3,410	3,076	0	3,420
Ending Stocks	200	103	200	100	0	0
TOTAL DISTRIBUTION	4,272	4,600	4,210	3,976	0	4,200



Import Trade Matrix			
Country	Netherlands		
Commodity	Wheat		
Time period	Jul - Jun	Units:	Metric Tons
Imports for:	1998		1999
U.S.	11,255	U.S.	1,279
Others		Others	
E.U.	2,672,890	E.U.	2,989,020
- France	1,290,101	- France	1,584,929
- Belgium/Lux	88,792	- Belgium/Lux	221,273
- Germany	1,176,644	- Germany	998,567
- U.K.	35,221	- U.K.	87,176
- Denmark	58,137	- Denmark	67,167
Hungary	597	Hungary	5,891
		Canada	15,045
		Ukraine	8,695
Total for Others	2,673,487		3,018,651
Others not Listed	319		1,110
Grand Total	2,685,061		3,021,040

Export Trade Matrix			
Country	Netherlands		
Commodity	Wheat		
Time period	Jul - Jun	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	277,895	E.U.	220,406
- France	7,718	- France	8,482
- Belgium/Lux	71,984	- Belgium/Lux	62,150
- Germany	51,319	- Germany	46,183
- Portugal	87,624	- Portugal	65,287
Turkey	22,556		
Morocco	7,941		
Total for Others	308,392		220,406
Others not Listed	2,577		3
Grand Total	310,969		220,409

PSD Table						
Country	Netherlands					
Commodity	Wheat, Durum				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1998		01/1998
Area Harvested	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	0
Production	0	0	0	0	0	0
TOTAL Mkt. Yr. Imports	0	33	0	58	0	50
Jul-Jun Imports	0	33	0	58	0	50
Jul-Jun Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	0	33	0	58	0	50
TOTAL Mkt. Yr. Exports	0	1	0	10	0	6
Jul-Jun Exports	0	1	0	10	0	6
Feed Dom. Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	0	32	0	48	0	44
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	33	0	58	0	50

Import Trade Matrix			
Country	Netherlands		
Commodity	Wheat, Durum		
Time period	Jul - Jun	Units:	Metric Tons
Imports for:	1998		1999
U.S.	451	U.S.	
Others		Others	
E.U.	32,109	E.U.	57,405
- France	1,448	- France	4,699
- Belgium/Lux	497	- Belgium/Lux	9,700
- Germany	30,164	- Germany	42,990
Canada	212	Canada	12
Total for Others	32,321		57,417
Others not Listed	39		87
Grand Total	32,811		57,504

Export Trade Matrix			
Country	Netherlands		
Commodity	Wheat, Durum		
Time period	Jul - Jun	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	730	E.U.	9,811
- France	0	- France	2
- Belgium/Lux	461	- Belgium/Lux	4,069
- Germany	263	- Germany	5,726
Total for Others	730		9,811
Others not Listed	0		2
Grand Total	730		9,813

PSD Table						
Country	Netherlands					
Commodity	Barley				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Harvested	39	39	59	60	0	50
Beginning Stocks	165	58	134	60	244	71
Production	214	214	355	350	0	260
TOTAL Mkt. Yr. Imports	900	637	900	821	0	800
Oct-Sep Imports	900	637	900	821	0	800
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	1279	909	1389	1231	244	1131
TOTAL Mkt. Yr. Exports	250	204	250	164	0	170
Oct-Sep Exports	250	204	250	164	0	170
Feed Dom. Consumption	570	250	570	360	0	350
TOTAL Dom. Consumption	895	645	895	996	0	921
Ending Stocks	134	60	244	71	0	40
TOTAL DISTRIBUTION	1279	909	1389	1231	0	1131

Import Trade Matrix			
Country	Netherlands		
Commodity	Barley		
Time period	Oct - Sep	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	636,973	E.U.	820,122
- France	249,992	- France	434,606
- Belgium/Lux	51,290	- Belgium/Lux	73,511
- Germany	293,340	- Germany	271,977
- U.K.	28,616	- U.K.	34,418
- Denmark	6,299	- Denmark	5,232
Total for Others	636,973		820,122
Others not Listed	197		929
Grand Total	637,170		821,051

Export Trade Matrix			
Country	Netherlands		
Commodity	Barley		
Time period	Oct - Sep	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	115,582	E.U.	62,721
- Belgium/Lux	31,720	- Belgium/Lux	16,468
- Germany	80,065	- Germany	41,733
Saudi Arabia	82,901	Saudi Arabia	54,425
Canada	0	Canada	43,799
Hungary	0	Hungary	2,900
Total for Others	198,483		163,845
Others not Listed	5,695		0
Grand Total	204,178		163,845

PSD Table						
Country	Netherlands					
Commodity	Corn				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Harvested	14	12	16	16	0	15
Beginning Stocks	0	30	0	20	0	10
Production	110	98	130	130	0	125
TOTAL Mkt. Yr. Imports	2100	2,130	2100	1,840	0	1,900
Oct-Sep Imports	2100	2,130	2100	1,840	0	1,900
Oct-Sep Import U.S.	1	1	0	1	0	1
TOTAL SUPPLY	2210	2258	2230	1990	0	2035
TOTAL Mkt. Yr. Exports	54	45	53	32	0	34
Oct-Sep Exports	125	45	125	32	0	34
Feed Dom. Consumption	931	900	885	1100	0	1150
TOTAL Dom. Consumption	2156	2,193	2177	1,948	0	1993
Ending Stocks	0	20	0	10	0	8
TOTAL DISTRIBUTION	2210	2258	2230	1990	0	2035

Import Trade Matrix			
Country	Netherlands		
Commodity	Corn		
Time period	Oct - Sep	Units:	Metric Tons
Imports for:	1998		1999
U.S.	441	U.S.	351
Others		Others	
E.U.	2,068,815	E.U.	1,774,890
- France	170,752	- France	1,459,495
- Belgium/Lux	36,956	- Belgium/Lux	38,357
- Germany	290,019	- Germany	274,586
- U.K.	8,458	- U.K.	1,823
- Austria	2,587	- Austria	24
Argentina	60,731	Argentina	60,278
Hungary	539	Hungary	1,225
Total for Others	2,130,085		1,836,393
Others not Listed	471		2,625
Grand Total	2,130,997		1,839,369

Export Trade Matrix			
Country	Netherlands		
Commodity	Corn		
Time period	Oct - Sep	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	45,063	E.U.	31,192
- France	10,666	- France	865
- Belgium/Lux	17,750	- Belgium/Lux	18,682
- Germany	11,845	- Germany	7,295
- U.K.	2,903	- U.K.	1,548
- Denmark	1,678	- Denmark	2,618
Total for Others	45,063		31,192
Others not Listed	38		100
Grand Total	45,101		31,292

PSD Table						
Country	Netherlands					
Commodity	Oats				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Harvested	2	2	2	2	0	2
Beginning Stocks	5	3	5	3	4	2
Production	11	11	10	10	0	11
TOTAL Mkt. Yr. Imports	20	17	20	24	0	22
Oct-Sep Imports	20	17	20	24	0	22
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	36	31	35	37	4	35
TOTAL Mkt. Yr. Exports	1	2	1	7	0	6
Oct-Sep Exports	1	2	1	7	0	6
Feed Dom. Consumption	10	12	10	14	0	13
TOTAL Dom. Consumption	30	26	30	28	0	26
Ending Stocks	5	3	4	2	0	3
TOTAL DISTRIBUTION	36	31	35	37	0	35



Import Trade Matrix			
Country	Netherlands		
Commodity	Oats		
Time period	Oct - Sept	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	17,263	E.U.	24724
- France	1,692	- France	10165
- Belgium/Lux	307	- Belgium/Lux	1809
- Germany	11,801	- Germany	10137
- U.K.	807	- U.K.	1564
- Finland	2,600	- Finland	1049
Total for Others	17,263		24,724
Others not Listed	1		3
Grand Total	17,264		24727

Export Trade Matrix			
Country	Netherlands		
Commodity	Oats		
Time period	Oct - Sept	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	2,175	E.U.	7,171
- Germany	1,536	- Germany	6,334
Switzerland	-	Switzerland	24
Norway	2	Norway	10
Total for Others	2,177		7,205
Others not Listed	9		1
Grand Total	2,186		7,206

# Rice

## Production

There is no commercial rice production in the Netherlands. However, the Netherlands is an important importer and miller of brown rice. The United States is the major supplier to the Dutch market with exports valued at approximately \$36 million followed by Italy (\$ 27 million), the Netherlands Antilles (\$ 14 million), Aruba (\$ 13 million), Thailand (\$ 10 million) and other EU member states.

## Consumption

Dutch rice consumption is fairly stable at 4 kilograms per capita per year (Central Bureau of Statistics). Fast-cooking rice accounts for over 80 percent of total rice consumption. Although rice is still viewed as a healthy and convenient food, competition with other foods such as Italian pasta and precooked potato products is increasing rapidly. The Dutch consumer is also demanding healthy, fresh and convenient (easy-to-prepare) products.

The Dutch culinary scene is becoming increasingly international and speciality restaurants from all over the world are found in the Netherlands. Despite the interest in foreign cuisine, health and convenience food, alternatives to rice, such as precooked potatoes and pasta, are also on the market. Dutch rice consumption in 1999-2000 is expected to remain similar to 1998 consumption levels.

## Trade

Total Dutch rice imports fell by about 15 percent in 1998 due to high stocks and falling exports. Imports from Thailand and India increased by about 30 and 23 percent respectively. This is because of competitive prices and the preference of the Dutch consumer for exotic rice. Imports from the U.S. fell by about 20 percent. According to trading sources, one of the main problems with U.S. rice is that it is not marketed as such and so remains invisible to the consumer. Although most of the imported rice is re-exported to other EU member states, exports to Eastern European countries stagnated in 1998 due to lower demand. Dutch traders anticipate that imports from India and Thailand will increase slightly in 2000 because consumer demand is firm.

Hill and Knowlton has been actively involved in promoting U.S. rice in the Dutch and Belgian markets on behalf of the USA Rice Federation since 1988. Their main objective is to enhance consumers awareness that the U.S. is one of the main rice producing countries in the world and that the long grain rice is a versatile, high quality product.

## Policy

The EU's rice import regime is complex and contains no fewer than eight different methods of calculating duties depending on the rice type, country of origin, and status of the importer. Effective January 1999, the Cumulative Recovery System (CRS), has been abolished. Import duties are established on the basis of a reference price system. Duties are 8 percent lower than in the CRS system.

**P.D. & Trade Matrices**

PSD Table						
Country	Netherlands					
Commodity	Rice, Milled				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Harvested	0	0	0	0	0	0
Beginning Stocks	0	20	0	1	0	1
Milled Production	0		0	0	0	0
Rough Production	0	0	0	0	0	0
MILLING RATE (.9999)	0	0	0	0	0	0
TOTAL Imports	235	182	250	185	0	180
Jan-Dec Imports	250	182	250	185	0	180
Jan-Dec Import U.S.	67	55	0	55	0	54
TOTAL SUPPLY	235	202	250	186	0	181
TOTAL Exports	125	136	75	125	0	111
Jan-Dec Exports	75	136	75	125	0	111
TOTAL Dom. Consumption	110	65	175	60	0	65
Ending Stocks	0	1	0	1	0	5
TOTAL DISTRIBUTION	235	202	250	186	0	181

Import Trade Matrix			
Country	Netherlands		
Commodity	Rice, Milled		
Time period	CY	Units:	Metric Tons
Imports for:	1997		1998
U.S.	67,540	U.S.	54,532
Others		Others	
E.U.	58,208	E.U.	48,189
Suriname	9,330	Suriname	12,114
Aruba	21,380	Aruba	6,444
India	5,057	India	6,588
Thailand	12,779	Thailand	17,622
Antilles	22,743	Antilles	11,041
Guyana	12,943	Guyana	13,505
Total for Others	142,440		115,503
Others not Listed	7,726		11,735
Grand Total	217,706		181,770

Export Trade Matrix			
Country	Netherlands		
Commodity	Rice, Milled		
Time period	CY	Units:	Metric Tons
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
E.U.	117,185	E.U.	129,469
Poland	1,631	Poland	643
Czech Rep	5,787	Czech Rep	1,527
Russia	1,188	Russia	338
Total for Others	125,791		131,977
Others not Listed	0		3,773
Grand Total	125,791		135,750